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Coping with Demographic Change: A Comparative View on Education and Local Government in Germany and Poland

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Reviewed by M.A. Andrzej Klimczuk Edited by M.A. Urszula Kieżun Anna Labentz Dr. Małgorzata Szajbel-Keck

The main goal of this book is to create a general theory of approaches in various countries how to cope with demographic change. It focuses on the search for innovative responses to population "shrinkage" and the consequences of population ageing in two neighbouring countries: Germany and Poland.

The comparison of Germany and Poland aims at showing in detail the distinctive ways in which both countries have tried to resolve problems posed by demographic change, such as fiscal capacity and unemployment rates, in particular in education and local government. While Germany is usually seen as a corporatist welfare state (characterized by, for example, social insurance based on contributions paid over the years and adjusted to individual income), Poland is regarded as a welfare state "in transition" (which is still developing a unique model of social policy as initiated after 1989).

The book proposes a theoretical framework of coping with demographic challenges that includes four conflicting strategies: expansion, reduction, reorganization, and threat rigidity. The first strategy deals with the acquisition of resources needed to resolve demographic challenges. The second one concentrates on how people's aspirations are set (reflexivity). Reorganization focuses on the means to reshape organizations as actors of public policies towards demographic change (for example, implementing rules of new public management in local public administration and schools). Finally, threat rigidity is a strategy that tackles issues such as refusal to change, lack of reaction or failure to recognize problems resulting from demographic change (for example, in personnel policies within various organizations). All of these strategies also discuss the relations between local administrations and other actors – private entities including commercial organizations and non-government organizations (NGOs).

The book consists of 11 chapters that have not been divided into sections. However, we can identify at least four overarching parts. The first part focuses on the theoretical approaches on coping with demographic change (chapters 1-3). The second part presents research methodologies (chapter 4), whereas the third part comprises empirical studies that describe various strategies for coping with demographic change (chapters 5-9).

The last part of this book summarises the consequences and effects of said strategies in various areas of public policy (chapters 10-11).

In the introduction, Sackmann underlines that the demographic shift should not only be viewed as population ageing but also as a process of population shrinkage that does not limit itself to European countries, but can be observed in all developed states (i.e. members of the Organisation for Economic Co-operation and Development, OECD). This demographic change has profound impact on public finances, the labor market, the social security system, education, and the economy, such as work organization. The second chapter, written by Sackmann and Jonda, gives a brief overview of classic demographic determinants of lower fertility rates, mortality decline, and migration patterns for Germany and Poland. According to indicators from the last two decades, fertility rates below reproduction level and mortality trends are similar in both countries. However, the decline in natural reproduction occurred later in Poland than it did in Germany. Finally, adverse changes in migration patterns in Germany had a considerable impact on migration trends in Poland mainly after opening the borders to labor migrants in 2011. This change in turn affects population decline in Poland, as the country has not yet developed its immigration policy. In the third chapter, Sackmann differentiates between demographic and non-demographic ways of coping with demographic change (which may be considered as a very original and interesting model for further studies and one major advantage of this book). The first group of strategies refers to instruments of family policy and migration with effects in the long-term. Thus, non-demographic coping with demographic change that focuses on changes in the short term may be seen as much more important than the previously mentioned strategies in developed countries. Sackmann also identifies issues related to the process of problem framing, the development of coping strategies, the institutionalization of adaptability, and mentalities. All of the above-mentioned issues are seen in the context of the labor market and the impact of demographic change on public administration.

In chapter 4, Sackmann describes data sets and methods used for the empirical studies in the following chapters. The research team applies a mixed approach by including both qualitative and quantitative methods. Data sets comprise:

- (1) 103 expert interviews in municipalities in Poland and Germany in 2006,
- (2) a postal survey of 319 mayors in Poland and Germany in 2010-2011,
- (3) a secondary data analysis of the Bertelsmann Foundation in Germany that is a postal survey of all municipal mayors in Germany in 2005,
- (4) a secondary data analysis of the Polish System of Educational Information that includes data on the employment periods of teachers in Poland for the years 2005-2007,
- (5) a secondary data analysis of budget development and educational expenses in the municipalities of the Łódź and Mazovian Voivodships for the year 2005,

(6) a comparative longitudinal secondary data analysis of the development of all educational organizations in Saxony-Anhalt for the years 1991-2010,

(7) a secondary panel data analysis of the demographic responsiveness of municipal finances in Germany and Poland for the years 1995-2010.

It does not become clear why the authors include data from different years. What is more, the qualitative expert interviews appear to be outdated as they were conducted immediately after Poland joined the European Union and a few years before the global financial crisis.

The empirical part opens with a chapter by Bartl that focuses on the ways of thinking about demographic indicators in Germany and Poland, and further, how this influences the activities of public sector organizations. Bartl underlines that the current schemes and programs of the provision of welfare services were created after the Second World War when populations were growing. However, when applied to less stable population numbers, these models cease to be accurate tools. The chapter discusses an in-kind calculation of service capacities in the public sector as well as its influence on the adaptation of tasks and resources. The result is that, depending on the institutional settings, the municipal governments usually lose funding, focus on efficiency for their personnel policy, and have lesser symbolic power, i.e. resident numbers. In the following chapter, Bartl compares municipal framing and coping strategies in Poland and Germany, mainly in terms of personnel policy of municipalities, which is evident in the cases of early childhood education, care services, and general local government administration. In chapter 7, Kopycka shows a more in-depth analysis of the expansive reaction to demographic change in the Polish education sector – as an alternative to reducing the infrastructure when decreasing cohorts are observed. Examples of this expansion are, amongst others, a higher quality of education that leads to higher student numbers, employing new teachers, and keeping overall educational expenses on a stable level. In chapter 8, Bartl focuses on the demographic responsiveness of education demand and supply at different levels of the education system on the example of Saxony-Anhalt, which experienced the largest population decline after 1989. Bartl shows that various local governments employ different strategies and that the infrastructure of early childhood education, schools, and vocational training have been adapted to the declining population. At the same time, a growing demand for higher education is observed. In chapter 9, Kopycka provides an analysis of personnel strategies in public sector organizations. The declining population leads to personnel reduction in Polish state schools, the emergence of the normative ideal of a "good employer," and the expectation of a more flexible staff.

The last two chapters present the effects of various response strategies. In chapter 10, Rademacher and Jonda underline the influence of demographic change on the mentalities of local decision makers with regard to the modes of reflexivity and personnel policy in municipalities. The authors propose the Local Authorities' Conversation Index (LACI) to measure the collective reflexivity of local authorities and distinguish five types of mentalities: "communicative-reflexive" (observed mostly in Poland), "autonomous-reflexive" (primarily in West Germany), "meta-reflexive local authorities" (in Poland and West Germany), "fractured-reflexive" (in Poland), and "demographically non-reflexive" (in Poland and West Germany). Thus, there is no clear trend in coping with demographic change as strategies vary. The authors underline that the index is still to be improved, while suggesting a set of hypotheses for further studies and in-depth explanations that are a crucial and inspiring

part of the book. In the last chapter, Rademacher describes how demographic change influences the fiscal capacity of municipalities and local unemployment. The analysis shows a weak correlation between demographic and economic indicators, of which structural inequalities between East and West Germany are the most influential factor.

One of the advantages of this book is that it uses extensive evidence and data sets. Its research value lies in an in-depth presentation of the mixed reactions to demographic change with regard to public policies and public administration. However, the volume could have offered a more detailed explanation of the behavior of corporate actors and NGOs as well as of the general consumption of goods and services provided not only by the public sector, but also the free market (for example the concept of "silver economy" that is becoming more influential both in Germany and Poland). It would have been interesting to read about an attempt at merging the proposed models with notions of public policies recently promoted by international organizations (for example the World Health Organization's concept of "active ageing" or "productive ageing" as promoted by the OECD).

Coping with Demographic Change: A Comparative View on Education and Local Government in Germany and Poland may be particularly interesting for scholars and practitioners who focus on demography, local governments, and education systems.



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